Local TV & Shared Services Agreements:
Examining News Content in Honolulu

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Abstract

In October 2009, a Shared Services Agreement (SSA) among three of the five television stations in Honolulu, Hawai'i went into effect. As a result of the SSA, three stations, KIVE, KHNL and KGMB combined their news operations as a new entity entitled *Hawai'i News Now*. Even before the SSA became a reality, there were serious concerns expressed by local citizens regarding the effect such an arrangement would have on the diversity of news in the market. Media Council Hawai'i (MCH), a local non-profit organization, filed a complaint and a request for emergency relief with the Federal Communications Commission to stop the implementation of the agreement. MCH contended that the SSA would negatively affect the content, diversity and competition of the Honolulu television market. The SSA owners argued, on the other hand, that television news in the DMA would be improved.

This research essentially tests those propositions. It is a content analysis of the daily newscasts of all five of the television stations in the Honolulu DMA and a comparison of their newscasts ***before*** and ***after*** the Shared Service Agreement went into effect. What differences, if any, occurred in content and the distribution of stories among the SSA stations, among the SSA stations as compared to the non-SSA stations and among the non-SSA stations across those time periods?

Introduction

Even with the advent of the Internet, local television news remains the critical news source for the American public. The Pew Research Center for the People and the Press found that almost two-thirds of the public identified local television news as their dominant local news source.

TV Is Dominant Source for National and Local News		
	Where do you get most of your…	
	National/Intrnl news	Local news
	%	%
Television	**71**	**64**
Internet	**42**	**17**
Newspapers	**33**	**41**
Radio	**21**	**18**

Rows add to more that 100% because of multiple responses.
Source: Pew Research Center for the People and the Press Survey Report September 13, 2009.

Further, the public sees local television news as the most important source for uncovering local stories.

Who does the most to uncover local stories?	
	%
Local TV stations	**44**
Local newspapers	**25**
News websites	**11**
Local radios stations	**10**
Multiple/DK	**9**
Total	***100***

Source: Pew Research Center for the People and the Press Survey Report September 13, 2009.

According to the Federal Communications Commission's (FCC) Notice of Inquiry for the 2010 Quadrennial Review of Broadcast Ownership Rules (NOI), there were 1,130 commercial television stations with 450 owners in 1996. In 2010, there are 1,302 commercial television stations and 303 owners, representing a 33 percent drop in the number of owners (FCC, 2010). In addition, the FCC reports that there are 175 television station duopolies, which include owners with "attributable local marketing agreements" in the 210 Nielsen television markets (FCC, 2010, p. 3). These local marketing agreements (variously known as shared services agreements or joint service agreements) are arrangements among stations in the same television market in which they share news-gathering resources, video, and/or marketing and management activities. Although the earliest of these agreements date as far back as 2000, in the midst of national and global economic instability, increasing numbers of local television news stations have signed these agreements. Purportedly, these agreements are expected to help relieve some of the economic burdens that are shouldered by local stations in gathering news content or other activities. It is uncertain what impact these agreements will have on the overall content of local news in markets with stations that have adopted this practice.

The FCC regulates the broadcast industry based on three principles---diversity, competition and localism. The implementation of the shared service agreements, whether they involve simply sharing video to sharing news-gathering resources to overall management of the station, has implications for each of the fundamental principles. How will these agreements affect, if at all, the construction of the newscasts? What effect, if any, will such constructions have on diversity, competition and localism in local television markets? What effect, if any, do these agreements have on the nature of news?

By any measure, the shared services agreements that have been concluded among the owners of television stations in the same market change the operation of the stations that are part of the agreement. That is their intended goal. Aspects of the stations--news, marketing, advertising, etc.—are shared among the parties to achieve some economies of scale in the operation of the stations. This research is an empirical examination of the news programming outcomes of such an arrangement in one market and it speaks directly to the issues raised in the Notice of Inquiry regarding quadrennial review of media ownership rules published by the FCC on May 25, 2010 (FCC 10-92).

The Honolulu Television Market

As of the writing of this monograph, the FCC does not have a definitive list of the stations that have entered into Shared Services Agreements (for purposes of this monograph, I will include local marketing agreements and joint services agreements under this term). Therefore, there is not a definitive list of the Designated Market Areas (DMA) where the phenomenon is present. Our own efforts have identified, at least, 45 DMAs in which these agreements are operative. However, the American Cable Association (ACA) identifies ownership arrangements of 36 instances in 34 DMAs of common ownership of multiple Big 4 affiliates in the same market. Further, ACA identifies 57 instances of common control of stations in 53 DMAs (American Cable Association, 2010).

One television market in which a shared services agreement is operative is Honolulu, Hawai'i. As of the 2009-2010 television season, the Honolulu television market consisted of 433,240 television households and it was ranked number 71 (it was #72 in 2009) out of the 210 television markets (DMAs) in the United States as determined by Nielsen Media Research.[1] There are five stations in the market that deliver daily locally-produced news broadcasts: KFVE (MyNetworkTV), KHNL (NBC), KGMB (CBS), KHON (Fox) and KITV (ABC). On August 18, 2009, Raycom Media, the owner of KHNL and KFVE and MCG Capital Corporation, the owner of KGMB announced the establishment of a Shared Service Agreement (SSA) under which the two companies would combine the three stations (KFVE, KHNL & KGMB) to "creatively and successfully address the impact of the negative economy and to secure the future of all three television stations in Hawai'i" (tvnewscheck.com, 2009). Paul McTear, president-CEO of Raycom Media further articulated the economic reasons for the action:

> The purpose of the shared services agreement is to not only secure the future of KHNL, KFIVE and KGMB, but to operate them more efficiently and effectively without diminishing the quality of news and other programming provided to our customers in Hawai'i. We realize there may be other financial and business options available, and while we are certainly open to discussing these with any interested party, the economic reality is that this market cannot support five traditionally separated television stations, all with duplicated costs. Rather than experiencing the loss of one, or possibly two stations in Hawai'i, we intend to preserve three stations that provide important and valuable local, national and international programming in Hawai'i (tvnewscheck.com, 2009).

Under the agreement, non-news programming remained in place, but the news operations two (KGMB & KHNL) of the three SSA stations were combined under one banner, *Hawai'i News Now*. The news operation began broadcasting on October 26, 2009. KHNL and KGMB jointly produce a simulcast of their newscasts on weekday mornings between between 5 AM and 7 AM , and weeknights from 5 to 5:30 PM and 10 to 10:30 PM. Therefore, three hours of the exact same daily news appears on the stations

[1] Source: Nielsen Media Research, Nielsen Station Index, estimates used for 2009-2010 television season. In 2010 there were 114,900,00 television households in the U.S.

each weekday. KFVE produces a 6:30 PM and 9 PM newscast. The news operations of all three stations are housed in the same building.

KGMB has consistently achieved significantly higher ratings than its simulcast partner, KHNL. According to Nielsen Media Research, in November 2010, the rating for KGMB's 10 PM newscast was 10 with a 25.[2] At the same time, the numbers for KHNL were a 3 rating and an 8 share (reported in the Honolulu Star Advertiser, January 2011). That pattern was consistent with the performance of the stations in November 2009 (9/22 for KGMB and 3/7 for KHNL). Officials at Nielsen Media have given the *Hawai'i News Now* operation permission to combine the ratings of KGMB and KHNL in order to determine its audience share. With that logic, the managers of *Hawai'i News Now* claim to be the ratings leader in the market.

KHON is the Fox affiliate in the Honolulu DMA and it signed on the air in 1952 as KONA-TV. The station is owned by New Vision Television based in Los Angeles, California and Atlanta, Georgia. The company currently owns fourteen major network affiliates and it operates three other stations in Birmingham, Alabama, Youngstown, Ohio and Mason City, Iowa under joint sales and shared services agreements. The company filed for bankruptcy on July 13, 2009, underwent a re-structuring of its debt and emerged 80 days later on September 30, 2009 with agreements with all its debt holders (New Vision Television, 2009). According to Nielsen Media Research, its 6 PM flagship evening newscast is a consistent ratings leader in the market, achieving a 12 rating and a 27 share in November 2009 and maintaining that performance in November 2010 with a 12 rating and a 28 share (reported in Honolulu Star Advertiser, January 2011).

KITV is the ABC affiliate in the Honolulu DMA and it signed on the air in 1954 as KULA-TV. KITV is owned by the Hearst television, Inc., based in New York City. Hearst currently owns 26 television stations and manages

[2] **Rating** is the percentage households of ***all*** television households tuned to a specific station. **Share** is the percentage of television households with a ***television in use*** tuned to a specific station at a specific time.

three others in 26 DMAs across the country. It also manages two radio stations in Baltimore, MD. The company holds duopolies in the Orlando, FL and Sacramento, CA television markets and owns one station and manages another in the Kansas City, MO market (Hearst Television, 2010). Its third-place performance in the ratings have been relatively consistent. According to Nielsen Media Research, its 6 PM evening newscast achieved a 6 rating and a 13 share in November 2009 but the station saw performance slip slightly in November 2010 with a 5 rating and an 11 share (reported in Honolulu Star Advertiser, January 2011).

In addition to the implementation of the Shared Services Agreement, in October 2009, the Honolulu market experienced another change in its media system when the Honolulu Advertiser was sold to the Honolulu Star-Bulletin in May 2010 (with the loss of 300 jobs). The sale made Honolulu a one-newspaper city (open.salon.com, 2010). As a result, the market's media landscape has undergone significant changes in a relatively short time.

Media Council Hawai'i

The Shared Services Agreement announced by Raycom and MCG Capital has been officially challenged by a local non-profit organization, Media Council Hawai'i (MCH). Founded in 1970, it was formerly known as the Honolulu Community Media Council. MCH, represented by the Institute for Public Representation at the Georgetown University Law Center, filed a complaint and request for relief with the Federal Communications Commission on October 7, 2009. MCH's filing is the only formal challenge that the FCC has received from a community group in any of the television markets in which Shared Service Agreements are in effect. As of February 2011, the FCC has not acted on the filing.

In its filing, Media Council Hawai'i contended that the Shared Services Agreement between Raycom and MCG Capital would result in "an unauthorized transfer of control in contravention of the Communications Act and FCC rules" (Campbell, 2009, p. 1). Further, MCH stated that these actions "would harm the members of Media Council Hawai'i and the general public by reducing the number of independent voices providing local news from four to three, and by substantially reducing competition in the provision of local news and the sale of advertising time" (Campbell, 2009, p. 2).

Research Question & Methodology

The basic question for this research was to examine the content of the local television newscasts in the Honolulu DMA before and after the implementation of the Shared Services Agreement. Specifically, the research question focused on the the stories that were broadcast on the five stations in the market that regularly delivered a daily newscast. Before and after the implementation of the Shared Service Agreement, what was the distribution of stories across: (1) the SSA stations combined; (2) the SSA stations individually; (3) the non-SSA stations combined; (4) the non-SSA stations individually? What differences, if any, occurred in the distribution of stories across the stations and across the two time periods?

Methodology

The methodology for this research was content analysis (Riffe, Lacey & Fico, 2005). It is a method that produces a systematic and objective description of information content. The analytical method used in this research was the Chi-square measure of association.

The sample of stations: The stations whose broadcasts were included in this research comprised all of the stations in the Honolulu DMA that regularly delivered a daily newscast to the viewers. They were: KFVE, KHNL, KGMB, KHON and KITV.

The sample of broadcasts: The sample of broadcasts for this research consisted of a constructed week of broadcasts before and after the implementation of the shared service agreement on October 26, 2009. A constructed week consisted of the newscasts of a particular day gathered over an extended period of time. For example, the Monday of the first week was included in the sample. The Tuesday broadcast of the second week was part of the data, and so on until the broadcast week was constructed. I limited the broadcast week to Monday through Friday to eliminate the possibility of week-end sporting events that might have pre-empted newscasts. The dates for the beginning of the constructed weeks for each period were randomly determined. For the period before the implementation of the SSA, that day was Monday, May 4, 2009. Therefore, the broadcasts that were included in this period were Tuesday, May 12, Wednesday, May 20, Thursday, May 28 and Friday, June 5. For the period after the SSA implementation, the randomly drawn start date was Monday, February 3, 2010. Consequently, the remaining dates were Tuesday, February 11, Wednesday, February 19, Thursday, February 22 and Friday, March 2. Using this approach, the sample consisted of fifty broadcasts, half of which occurred over a five-week period before the SSA implementation and half of which occurred over a five-week period after the implementation of the SSA.

The broadcasts for this research were obtained from the archives of Dateline Media in Honolulu. Given the schedule of the stations, the 6 PM broadcasts of KHON and KITV, the 10 PM broadcasts of KGMB and KHNL and the 9 PM broadcast of KFVE were included in the sample. Dateline Media provided DVDs with the sample broadcasts to the Local Television News Media Project at the University of Delaware for coding by two doctoral students.

Unit of observation: The unit of observation for this research was the individual stories that appeared on the broadcasts. The coding revealed a total of 711 separate stories[3] that were broadcast across the stations, excluding sports and weather segments. There were 324 stories broadcast in the pre-SSA period and 387 stories were broadcast post-SSA. The professional literature regarding the construction of a newscast recognizes that the sports and weather segments are structural features of the broadcast (Donald & Spann, 2000; Jones, 2004). They are always included in the newscast and, as a result, they are not subject to the news selection calculus that is applied to all other stories. They are always "in" the broadcast. And, even within the segments, the "in-or-out" decision model is less stark than that with the general news outside of the segments. In general, the sports segments on local television news deal with the day's scores or activities of whatever sport is in season and not with in-depth sports reporting. The stories were distilled from the broadcast units that were presented. Including the station promotions (n=297), commercials (n=177), weather segments (n=62) and sports segments (n=48), there were 1295 broadcast units among the newscasts.

Even though the sports and weather segments were not included in the sample of stories, sports and weather stories that were presented outside of those segments were coded as news. For example, a story regarding the effects of flooding that was broadcast outside of the weather segment was coded as a news story. Likewise, a sports story concerning the level of steroid use in professional baseball that was presented outside of the sports segment would also be coded as a news story.

[3] The distribution of the stories across the five television stations was: KFVE=134; KGMB=191; KHNL=169; KHON=109, KITV=108.

Findings

In this research, the analysis was organized around a comparison of the performance of the stations pre- and post-SSA and between the stations that are part of the SSA station group (KFIVE, KGMB, KHNL) and the non-SSA station group (KHON and KITV). The following findings reflect that comparison along the dimensions of content (story topic and local vs. non-local stories) and production factors (duration and story placement) and distribution across the newscasts.

Story Topic

The initial coding scheme developed twenty-one separate categories for topic in order to capture the differences among the stories. After analysis, those twenty-one categories were collapsed into five: (1) crime; (2) public issues (containing all public issues such as housing, education, health, environment, etc., except crime); (3) government/politics; (4) human interest; (5) other (fires, accidents, etc.).

There was a statistically significant change (meaning that the difference occurred beyond chance) in the distribution[4] of story topics before and after the implementation of the Shared Services Agreement and across the SSA station group and the non-SSA station group (Table 1). The proportion of stories devoted to public issues dropped significantly for both station groups after the SSA was implemented in October 2009. For the SSA station group the decrease was from 37 to 30 percent; the non-SSA station group realized a drop from 44 to 26 percent. Crime stories increased for both station groups after the SSA became operational, from 14 percent to 20 percent and 23 to 30 percent for the SSA and non-SSA groups, respectively. Although there was an increase in the coverage of government and politics in the post-SSA period (11% to 16% and 10% to 16% for the SSA and non-SSA groups, respectively), news coverage of that topic was relatively sparse (Table 1).

[4] In previous research, I have used the proportion of ***time*** that was devoted to story topics rather than proportion of ***stories*** devoted to the topic because time is the most scarce element of a newscast. However, the questions for this research focused on individual stories and how they were broadcast across the various stations. Therefore, the proportion of ***stories*** devoted to a particular topic was utilized as the variable that indicated the performance of the stations.

Table 1: Distribution* of stories by topic, Pre/Post SSA by Station Group				
	SSA-group		*Non-SSA group*	
Topic	**Pre-SSA**	**Post-SSA**	**Pre-SSA**	**Post-SSA**
Public Issues	**37**	**30**	**44**	**26**
Human Interest	**24**	**21**	**10**	**18**
Crime	**14**	**20**	**23**	**30**
Other**	**14**	**13**	**13**	**10**
Government/ Politics	**11**	**16**	**10**	**16**
Total	***100***	***100***	***100***	***100***

***Percentage of stories ; **Other=fires, accidents, entertainment, etc., N=711 stories. Note: p=<.05.**

Local vs. non-Local Stories

One of the fundamental principles on which the Federal Communications Commission bases media ownership policy is localism. In previous research, researchers for the FCC determined the definition of localism, in part, by the delineation of Designated Market Areas by Nielsen Media Research. In a letter dated April 3, 2003 to the FCC quoted in their (FCC researchers) paper, that Nielsen Media Research offered the following explanation for the construction of DMAs: "In designing the DMA regions, Nielsen Media Research uses proprietary criteria, testing methodologies and data to partition regions of the United States into geographically distinct television viewing areas, and then expresses them in unique, carefully defined regions that are meaningful to the specific business we conduct" (as cited in Alexander and Brown, p. 4).

The FCC researchers established necessary and sufficient conditions for localism. The "necessary" condition for localism was that the story had to take place within the DMA. The "sufficient" condition concerned the news stories themselves. When was a story broadcast by a station in a DMA a "local" story? The decision rule for sufficiency used by the FCC researchers and adopted in this analysis stipulated that the story was "local" if the story was of at least marginally greater importance to the average individual residing within the DMA and that the individual would identify the story as local. "Thus, it is the value of the story to the individual within the DMA, and that individual's perception of the story as local relative to individuals in other DMAs, that gives the story its sufficient local context" (Alexander and Brown, p. 5).

For example, a story about the New York Stock Exchange and its effect on the economy that was broadcast in the New York DMA would necessarily interest persons in that television market whose professional activity was tied to the stock market. However, the average individual in the New York television market would likely view that story as a national issue. Based on my previous research, the local versus non-local nature of the story was relatively straightforward. That is especially so given that the first criterion for the designation as a local story is the requirement that the action of the story has to occur within the DMA.

Table 2: Distribution* of *Local* stories, Pre/Post SSA & SSA vs non-SSA station groups

Station group	*Pre-SSA*	*Post-SSA*
SSA station group	**79**	**69**
Non-SSA station group	**93**	**92**

***Percentage of *local* stories, N=711 stories (324 stories pre-SSA and 387 stories post-SSA); Note: p=<.05.**

There were significant differences in the proportion of stories that were local and non-local across the stations groups and across the pre and post-SSA periods. Both before and after the implementation of the SSA, the SSA group of stations broadcast significantly fewer local stories than their non-SSA counterparts. In the pre-SSA period, just over three-quarters (79%) of SSA group's stories were local. That was in contrast to the 93 percent of local stories that appeared on the non-SSA stations (Table 2). During the post-SSA period, that difference increased as the SSA group proportion of local stories decreased to just over two-thirds (69%) while the proportion of local stories (92%) for non-SSA group remained virtually unchanged.

Production Factors: Duration, Placement, Presentation Mode

The managers of the Shared Services Agreement stated specifically that the reason for the arrangement was to secure the long-term economic health of the stations involved in the SSA. It was a move that was dictated by economic concerns. Fundamentally, they wanted to reduce the costs of production of the newscasts. There are two production aspects of the stories that speak directly to that economic calculus---the duration of the story and the presentation mode that is used to convey its substance. I looked at the each of those factors for the SSA and non-SSA stations before and after the implementation of the agreement.

Duration

The most scarce resource in broadcast news is time. It is finite. As a result, the news selection calculus is a zero-sum game. If some stories are in, then others are out. That was the calculus that played out in the selection of the types of stories that was presented in the above section (see Table 1). But, once the in/out decision is made for a particular story, other crucial decisions are taken. The first is how much time will be devoted to the story. The adage that time is money is literally true in the case of television news. Therefore, the duration of stories represents a cost decision on the part of the news director. What were the results of those decisions for the story types across the stations groups before and after the SSA became operational?

There were significant differences in the duration of stories by both groups pre- and post-SSA. For all stories, the largest change occurred for the SSA stations. Before the SSA was launched, the median duration (51 seconds) of stories for the SSA group was exactly the same as the stations in the non-SSA group (Table 3). However, after the SSA went into effect, the stories for the SSA stations became significant shorter (29 seconds) while the median length of stories for the non-SSA stations decreased slightly (51 to 45 median seconds).

There were dramatic differences in the median duration of stories across the story topics. For both station groups, the median length of stories covering public issues dropped from the pre- to post-SSA period (58 to 33 and 48 to 37 median seconds for the non-SSA and SSA groups, respectively). Conversely, crime stories were shorter in the post-SSA period for the SSA stations (28 to 20 seconds) and longer for the non-SSA stations (34 to 44 seconds). The largest change in the median length of stories from pre- to post-

SSA occurred for the non-SSA stations' coverage of government and politics (91 to 51 median seconds).

Table 3: Duration of stories, Pre/Post SSA by Station Group		
	Pre-SSA	*Post-SSA*
non-SSA group	***Median # seconds***	***Median # seconds***
Public Issues	**58**	**33**
Crime	**34**	**44**
Govt/Politics	**91**	**51**
Other*	**44**	**43**
Human Interest	**65**	**52**
All stories	***51***	***45***
SSA group		
Public Issues	**48**	**37**
Crime	**28**	**20**
Govt/Politics	**35**	**33**
Other*	**27**	**24**
Human Interest	**69**	**39**
All stories	***51***	***29***

***Other=fires, accidents, entertainment, etc., N=711 stories (324 stories pre-SSA and 387 stories post-SSA); Note: p=<.05.**

The overall decrease in the median length of stories may indicate a decision on the part of the producers to pack more stories into the broadcast in order to attract and hold a larger audience.

Story Placement

A complimentary characteristic of time in a broadcast is story placement. Just like the judgment regarding how much time will be devoted to a story, the decision about where to place it in the newscast is critical because the stories of a newscast are viewed by the audience in a series. Unlike print media, the audience cannot skip over the first story to get to the second or third or others. Therefore, each story in the broadcast has two purposes: to inform the audience and to hold that audience for the next story. Indeed, there is some research that suggests that the need to hold an audience has made the news “infotainment” (McManus, 1994) and that is constructed only to sell the audience to advertisers (Hamilton, 2004). Consequently, the placement of a story is a crucial factor in the cost calculus of a newscast. In the placement decision, the station explicitly indicates what information it thinks will achieve and hold an audience. Coupled with shorter stories (as mentioned above), the placement of a story sets what news directors call the “pace” of the newscasts.

The variable I constructed for story placement was block, defined as the time between the commercial breaks. The first block is the period from the opening of the newscast to the first commercial break. It typically lasts between 9 and 11 minutes and it is, by far, the longest period of uninterrupted news in the program. It is the opportunity for the broadcast to capture and hold an audience. In the analysis, the content of Blocks 1 & 2 was maintained, but the findings for Blocks 3 to 6 were collapsed because they represented a relatively small proportion of content.

Broadcast coverage by block was decidedly different between pre- and post SSA time periods within and across the station groups. For example, in the pre-SSA period, over forty percent of the stories in the first block for the non-SSA stations was devoted to public issues (Table 4). That was followed by crime (31%), government/politics (14%), other (12%) and human interest (2%). That distribution changed significantly in Block 2 where public issues accounted for over half of the stories (51%) and crime decreased five-fold (to 6%).

Not only did the placement of stories for the non-SSA stations change across blocks in the pre-SSA period, there was also a different alignment of stories in Block 1 after the SSA went into effect. In the post-SSA period, crime (38%) was the most prominent story topic in Block 1, followed by public issues (23%). That represented a reversal of that distribution from pre-SSA broadcasts (Table 4).

For the SSA stations, there also were significant changes in the distribution of story topics across the newscasts. In the pre-SSA period, public issues accounted for a significant proportion of stories in both Block 1 and Block 2 (41% and 43%, respectively). However, after the SSA was implemented, the public issues still accounted for a plurality (36%) of Block 1 stories, but crime rose by about fifty percent (to 16%). Further, the distribution of story topics in Block 2 changed dramatically from pre-SSA conditions as the coverage of government/politics (41%) and the Other category of stories (26%), dominated the block (Table 4).

Table 4: Distribution* of stories by Block, by Story topic, Pre/Post SSA by Station Group

	Pre-SSA			*Post-SSA*		
	Block1	**Block2**	**Block3+**	**Block1**	**Block2**	**Block3+**
non-SSA group						
Public Issues	41	51	40	23	34	36
Crime	31	6	0	38	19	0
Govt/Pol	14	9	0	17	26	0
Other**	12	25	25	13	0	14
Human Interest	2	9	35	9	21	50
	100	*100*	*100*	*100*	*100*	*100*
SSA group						
Public Issues	41	43	17	36	21	28
Crime	11	7	0	16	6	9
Govt/Pol	11	13	3	12	41	0
Other**	18	4	5	17	26	16
Human Interest	19	33	75	19	6	47
	100	*100*	*100*	*100*	*100*	*100*

***Percentage of stories ; **Other=fires, accidents, entertainment, etc., N=711 stories (324 stories pre-SSA and 387 stories post-SSA).**

Presentation Mode

Selection, duration and placement are all important production aspects of news stories. However, the most cost sensitive factor in the production of a newscast is the presentation mode of the story. It involves decisions regarding the deployment of the station's most costly resources—personnel. Between 2008 and 2009, local television news lost over 1600 jobs. But, despite staff reductions during that time period, the average amount of news increased from 4.1 hours per day to 4.6 hours per day (Pew, 2010). As a result, new directors have been asked to produce more stories with fewer staff. And, news production is an extremely labor intensive activity. Therefore, the decisions regarding how a news story is presented represents a major economic decision. By definition, different presentation modes require different expenditures of resources and the choice of presentation mode for story types reflects the station's judgment regarding which stories can capture and deliver an audience to advertisers. Consequently, the choice of presentation mode in a newscast has major economic implications.

I defined presentation mode as the system of professional broadcast techniques used to communicate the narrative and/or the pictures of the stories to an audience. I identified five types of presentation mode: voice-over by anchor; anchor-read without video; package; live location report; and reporter live in the newsroom.

In the voice-over by anchor mode (VO/anchor), the story was delivered by the news anchor who provided narrative as the videotape that was shot for the story was shown on the screen. This presentation mode was the overwhelmingly preferred choice of news directors and accounted for two-thirds (66%) of all of the stories (N=711). The frequency of the use of this mode makes economic sense. The anchor represents the "brand" of the station to the community and, typically, the anchor is the highest paid member of the news staff. Using the anchor in the presentation of as many stories as possible increases the return on that investment.

A second approach to presenting stories was the reading of the narrative by the anchor without any video being shown on the screen (anchor read w/o video)---the proverbial talking head.

In the package presentation mode, a news crew (reporter and camera operator) went to the scene of the story, shot video, produced the video for broadcast and the reporter wrote the narrative for the voice-over. The package mode required more time and resources and it was the most expensive method for presenting a story.

Live location reports involved the reporter going to the location of the story and broadcasting from there during the newscast. This is the time-honored "stand-up" approach.

The presentation mode of live reporter in the newsroom is a variation on the theme of the VO by anchor. In this approach, the anchor introduces the story and then "tosses" the remainder of the presentation to a reporter who is somewhere else in the newsroom who completes the narrative.

For the purposes of this analysis, I collapsed the types of presentation mode from five to three categories, given the use of the modes across the newscasts. The VO by anchor and package modes were considered separately because they accounted for the overwhelming majority of the modes for the stories. The anchor read, live reporter in newsroom and the live location modes were combined into the Other presentation mode category.

Table 5: Distribution* of presentation mode, Pre/Post SSA by Station Group

	SSA-group		*Non-SSA group*	
Topic	**Pre-SSA**	**Post-SSA**	**Pre-SSA**	**Post-SSA**
VO by anchor	**62**	**73**	**58**	**69**
Package	**30**	**16**	**25**	**20**
Other**	**8**	**11**	**17**	**11**
Total	***100***	***100***	***100***	***100***

***Percentage of stories ; **Other=anchor read; live location; reporter in newsroom, N=711 stories (324 stories pre-SSA and 387 stories post-SSA); Note: p=<.05.**

There was a statistically significant difference in the use of presentation modes between the pre- and post-SSA time periods and between the station groups. For the SSA station group, the use of VO by anchor increased from sixty-two percent of stories to seventy-three percent of stories. There was also a significant increase for the non-SSA stations (58% to 69%). In both instances, the station groups made much more use of this relatively less expensive presentation mode in the post-SSA period.

Perhaps, the most significant change occurred for the SSA stations' use of the package mode. From the pre- to the post-SSA period, the SSA stations reduced their use of the package mode by about half (30% to 16%). The non-SSA stations also decreased their use of the package mode, but by only about one-fifth (25% to 20%). Coupled with the substantial decrease in the media duration of stories (see Table 3), this move away from using this presentation mode may indicate a move away from longer and more expensive stories. If that is so, then the opportunities for more "enterprise" stories may have been diminished.

Distribution of Individual Stories, Pre/Post SSA

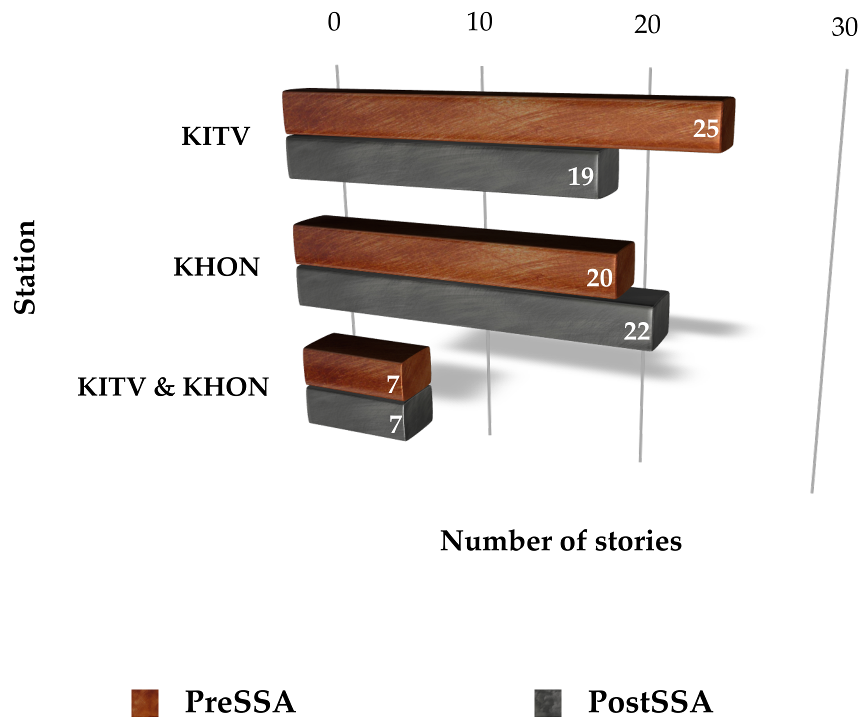
In order to examine the possible effect of the implementation of the Shared Services Agreement, I analyzed the distribution of each specific story across the stations. That is, on how many stations did a story appear on the same day? There were many possibilities, from only one station to all five stations, with a myriad of combinations in between. I looked at every combination that appeared in the data. The specific distributions that revealed themselves were: (1) stories that appeared only on the non-SSA stations either individually or in combination of non-SSA stations (n=100); (2) stories that appeared only on the SSA stations individually (n=72); (3) stories that appeared only on a combination of SSA stations (n=233); and (4) stories that appeared only on a combination of SSA stations and non-SSA stations (n=306).

The findings are organized to indicate the distribution of the stories as they were broadcast by the stations. Each story (N=711) is counted only once in this analysis and it is categorized by the number and type of station(s) on which it appeared. For example, the stories that were categorized as having been broadcast only on the SSA stations individually appeared either on only KFVE, only KHNL, or only KGMB and nowhere else. Likewise, the stories that were reported only on a combination of the SSA stations were broadcast on two or more of the SSA stations, and nowhere else. In this manner, it was possible to determine the extent to which, if at all, stories appeared on multiple stations, before and after the implementation of the Shared Services Agreement and within which station group as defined by the SSA and non-SSA stations. The tables that follow indicate the findings for each of the specific distributions across the stations.

Non-SSA stations, KHON & KITV

The stations that were not part of the Shared Services Agreement broadcast 100 of the 711 stories that were part of the database, 52 pre-SSA and 48 post-SSA. The distribution of the stories across the stations was virtually the same in the pre-and post-SSA periods (Figure 1). In terms of the separate stories that each station broadcast, they seemingly made the same news judgements in both time periods. In both time periods, KHON and KITV broadcast a similar number of individual stories and only seven stories appeared on both broadcasts pre-and post the implementation of the SSA.

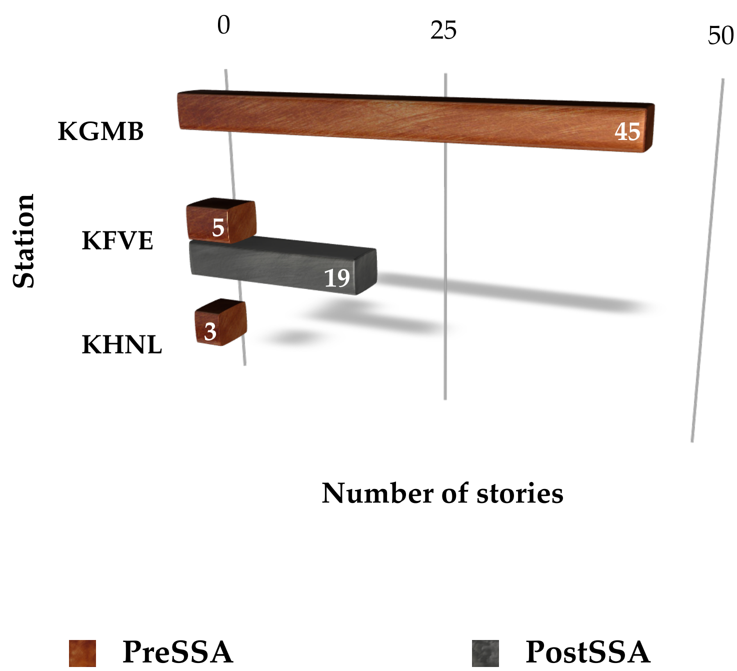
Figure 1: Distribution of stories for non-SSA stations, Pre/Post SSA



SSA stations, KFVE, KGMB, KHNL, Individual stories

The stations that were part of the Shared Services Agreement exhibited very different broadcasting behavior regarding stories that were broadcast only on the station and nowhere else. The differences in the 72 stories (53 pre- and 19 post-SSA stories) were statistically significant. The largest differences occurred with KGMB where the number of individually broadcast stores fell precipitously from 45 pre-SSA stories to none in the post-SSA period. That is explained by the fact that KGMB was part of the simulcast with KHNL in the post-SSA period. KNHL produced no individual stories in the post-SSA period. Interestingly, KFVE, which was not part of the simulcast, increased its individually broadcast stories in the post-SSA period (Figure 2).

Figure 2: Distribution of *individual* stories for SSA stations, Pre/Post SSA

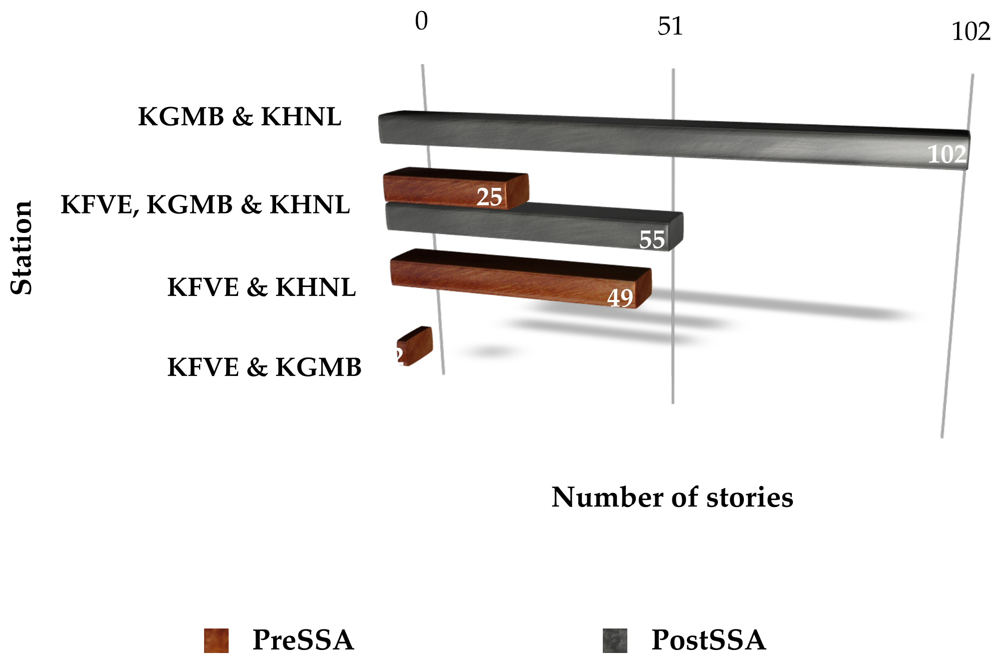


p=<.05

SSA stations, KFVE, KGMB, KHNL, Combined stories

The stations that were part of the SSA exhibited the most significant change in their broadcasting behavior with respect to the number of stories that appeared on combinations of those stations before and after the implementation of the Shared Services Agreement. Prior to the SSA, only 76 stories (25 stories on all three SSA stations, 49 stories and 2 stories, respectively, on a two station combination) on were broadcast on two or all three of the stations (Figure 3). There were no stories that were presented on the KGMB and KHNL combination before the advent of the SSA. After the SSA, however, stories that appeared on a combination of those stations virtually doubled to 157 (102 stories on the simulcast and 55 stories on the simulcast plus KFVE). The KGMB and KHNL combination accounted for 102 of those stories and that represented the most dramatic change in station behavior. Of course, that is due to the decision of the SSA station management to simulcast the 10 PM newscasts of both stations. Viewers in the Honolulu DMA saw exactly the same newscast (with different commercials) regardless of the station they chose to watch.

Figure 3: Distribution of *combined* stories for SSA stations, Pre/Post SSA



p=<.05

In addition to the activity on KGMB and KHNL, there was a change in the broadcasting of stories when KFVE was added to the equation. Prior to the SSA, there were 25 stories that were broadcast on all three of the SSA stations. That number more than doubled to 55 in the post-SSA period. Prior to the SSA, 49 stories were broadcast by KFVE and KHNL; that number dropped to zero after the SSA became operational. It is reasonable to suggest that the KFVE/KHNL combination gave way to the KFVE/KGMB/KHNL arrangement in the post-SSA period. In so doing, the SSA broadcasts became more alike in that they were presenting the same stories.

SSA & non-SSA stations, Combined stories

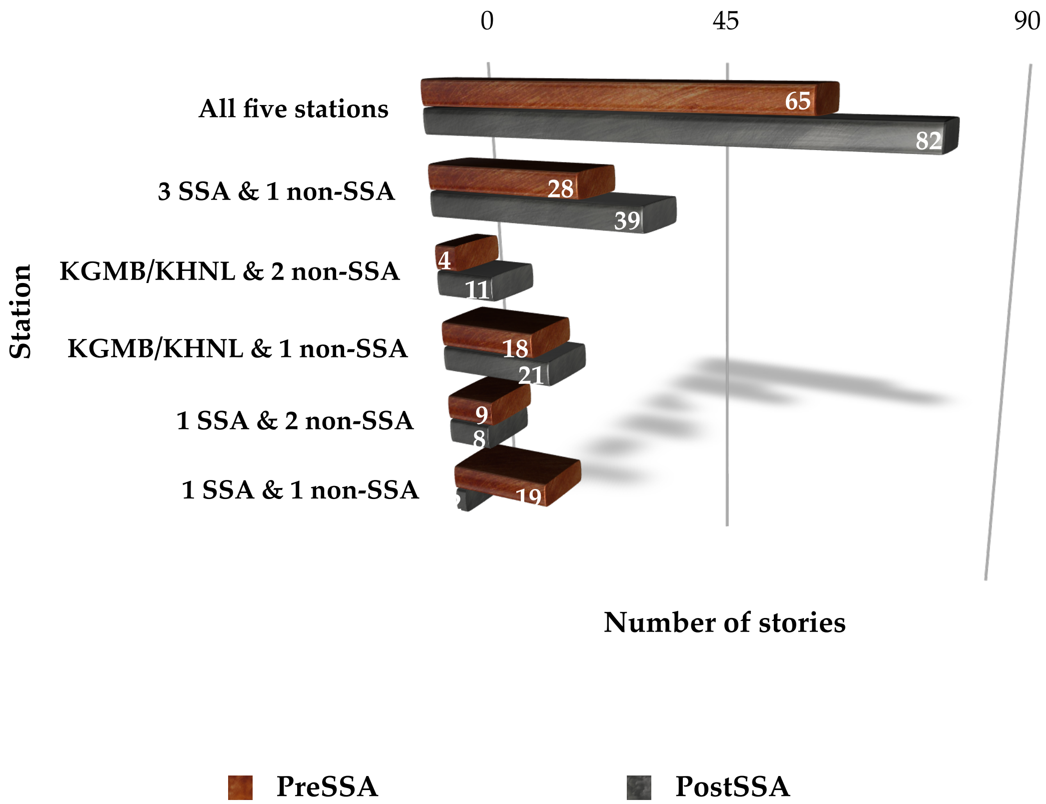
A significant proportion of the total number of stories were broadcast across some combination of SSA and non-SSA stations in the pre- (n=143) and post-SSA (n=163) periods. That broadcasting approach was most evident in the number of stories that appeared on all five stations; 65 stories and 82 stories in the pre- and post-SSA periods, respectively (Figure 4). At first glance, that suggests that the stations were exercising the same news selection process across a wide range of stories. However, that was not the case. A closer examination of the stories revealed that they covered only twenty-seven separate topics and, given the news selection process that governs local television (Klite, 1998; Miller, 1998; Gilliam & Iyengar, 2000; Yanich, 2004), they were stories that would have made the news regardless of the SSA arrangement. For example, ten topics covered crime, fires or accidents; another nine topics dealt with public issues to include the Mayor's budget plan, the H1N1 flu virus and electricity rates, among others. Human interest stories accounted for another five topics, the most common of which was Tiger Wood's public apology. The remaining three topics were dispersed among weather, volcanic activity and the confirmation of a judge.

Beyond the stories that appeared on all five stations, the next most common distribution of stories occurred across the three SSA stations and one non-SSA station. As with the case for five stations, that number also increased from the pre- to post-SSA period (28 to 39 stories, respectively).

The category of stories that was covered by one SSA station and two non-SSA stations looked relatively stable from the pre- to the post-SSA period (9 and 8 stories respectively). However, the details of that coverage were revealing. In the pre-SSA period, the combination of stations that broadcast the stories consisted of KGMB (SSA station) and non-SSA stations KHON and KITV. In the post-SSA environment, that combination broadcast no stories and the SSA station (KGMB) was replaced by KFVE which presented all nine of the stories in that category.

There was a significant decrease in the number of stories that were presented on one SSA station and one non-SSA station between the two periods, (19 and 2 stories, respectively).

Figure 4: Distribution of *combined* stories for all stations, Pre/Post SSA



p=<.05

It is important to note that the categories that specify 2 SSA stations and 1 or 2 non-SSA stations in Figure 4 consist of the two simulcasting SSA stations (KGMB and KHNL). There was no instance in which the SSA station combination included KFVE and either KGMB or KHNL and a non-SSA station. Therefore, the 11 and 21 stories for two SSA stations and one or two non-SSA stations in the post-SSA period were, essentially, the exact same stories due to the simulcast.

Summary

The distribution of stories across the stations in the Honolulu television market was significantly affected by the implementation of the Shared Services Agreement between Raycom Media and MCG Capital Corporation. The most conservative reading of the findings shows that the SSA had its greatest effect on stories that were broadcast only on the combination of KGMB and KHNL (the simulcast). Prior to the implementation of the SSA, that combination presented no stories. After the SSA, that combination accounted for twenty-six percent (102 out of 387) of the stories broadcast in the post-SSA period (Table 6). To be clear, this refers to the stories that were broadcast only on the combination of KGMB/KHNL and nowhere else.

A more expansive interpretation of the effect of the SSA and the simulcast would have to consider any of the stories that appeared on KGMB and KHNL only and in combination with other stations. In this approach, all of the stories that appeared on the KGMB/KHNL combination (whether

Table 6: Stories on KHNL/KGMB *and* other station combinations, post-SSA

Station combination post-SSA	Number of stories
KGMB/KHNL only	***102***
KFVE, KGMB, KHNL (3 *SSA* stations)	**55**
All 5 stations	**82**
3 *SSA* & 1 *non-SSA*	**39**
KGMB/KHNL & 1 *non-SSA* station	**21**
KGMB/KHNL & 2 *non-SSA* stations	**11**
Total	***310***

There were 387 stories broadcast in the post-SSA period.

on the simulcast only or with other stations) must be added to the total of duplicated stories. That calculus reveals that eighty percent of the stories (310 out of 387) in the post-SSA period were broadcast as part of the simulcast. That compares to a pre-SSA proportion of thirty-five percent of stories (115 out of 324) that were broadcast in those combinations. Whichever of these metrics is used, it seems clear that the SSA had an effect on the local newscasts in the market.

Conclusion

The Notice of Inquiry regarding media ownership that the Federal Communication Commission issued in May 2010 specifically addressed the question of ownership structures within television markets. An increasing number of those structures now involve agreements among stations that are not ownership arrangements, but they stipulate a set of conditions in which the parties share fundamental aspects of the operation of the station (sales, marketing, news video or even news production). The obvious question is what might these arrangements mean for the issues of competition, diversity and localism in the markets in which they operate.

In this research, I examined one market in which a Shared Services Agreement (SSA) was implemented---Honolulu, Hawai'i. I compared the local newscasts before and after the SSA was put into effect in October 2009. I chose the Honolulu market because it represented the only case in the U.S. in which there was an official challenge by a community group to the Federal Communications Commission regarding the SSA. As of the writing of this monograph, the FCC has not ruled on the matter.

What was the result of the analysis? The short answer is that the implementation of the Shared Services Agreement had a profound effect on the local news broadcasts in the market. The most significant finding is that two stations that were part of the three-station SSA group simply duplicated their newscasts through the mechanism of a simulcast. On weekdays at 10 PM, the news broadcasts of KGMB and KHNL were exactly the same (save different commercials). It did not matter which channel the viewer chose. That was a substantial change because, prior to the SSA, there were no stories that appeared in that combination. As mentioned previously, after the SSA was implemented, that combination accounted for 26 percent of the stories. The simulcast approach has been used even more extensively by KGMB and KHNL. Although I did not examine the other newscasts during the day, the two channels also simulcast news between 5 and 7 AM and between 5 and 5:30 PM. By definition, the simulcasts removed separate newscasts from the news offerings in the market on any given day. The obvious and unambiguous result is a reduction in the number of separate news voices in the market.

The managers of the SSA made the argument that the agreement was necessary to provide sound financial footing to the stations which would, in turn, improve the capacity of the stations to produce more enterprising news content. Presumably, the SSA stations would realize these advantages by achieving economies of scale in the production of news by reducing duplication of effort. Those economies of scale would be important because the SSA resulted in the loss of 68 of the 190+ jobs that comprised the staff of the three SSA stations (Dateline Media, 2010). However, judging by the change in duration of stories and the presentation modes that were used to present the stories pre- and post-SSA, there was no evidence of an increase in enterprise reporting by the SSA stations,. For the SSA stations, the median duration of stories dropped significantly (43%) from the pre-to post SSA periods. That was compared to a ten percent drop in the median duration for the non-SSA stations. It would seem relatively more difficult to present "enterprise" stories as the median broadcast time allotted for stories substantially decreased.

In addition to the duration of stories, the SSA stations changed the use of presentation modes between the time periods. The most significant change came with a reduction of the use of the package mode by almost half (47%). The package mode is the most expensive method to present the narrative and pictures of a news story and it would logically be the approach most closely associated with "enterprise" stories in which more complex issues are examined. But, the SSA stations moved away from that approach and increased the use of less expensive modes. Coupled with the decrease in the duration of stories, the reduced use of the package mode would seem to make the production of "enterprise" stories much more difficult to accomplish in the post-SSA period. To the extent my analysis could detect, "enterprise" stories were not a large part of the offerings of any of the stations in the market before the SSA was implemented. However, an increase in their number as a result of the shared news production of the SSA stations did not materialize.

There is an argument that the media landscape has changed drastically with more diverse ways to acquire news in local places. That is true. But, even within that landscape, a recent survey by Frank N. Magid Associates confirms that local television news remains the most engaging source of information for citizens. Over half of the public (55%) reported that it was the most preferred medium for news and political information. Its nearest competitor is web sites/Internet at only about one-fifth of respondents. Further, after news on search engines, local television news websites were the most frequently used source of news (Magid, 2010). In addition to a prominent information source, local television news also scored very highly on the key advertising effectiveness metrics of keeping viewers knowledgable about products and services, trustworthiness and respectability (Magid, 2010).

These were important findings because local news is, by far, the most profitable type of programing for local stations, accounting for forty-four percent of the stations' profits (Pew, 2010). Pew goes on to state that the proportion of stations' profits from newscasts is "increasingly significant" when considering that the average television station broadcasts an average of just over 4.5 hours of news per day. The remaining broadcast day---more than 19 hours---accounts for the other fifty-six percent of profits (Pew, 2010). Pew concludes that, "local news continues to play a critical role in local TV financing" (Pew, 2010). All this is to confirm the place that local television news holds in the calculus of media owners who recognize the value of the franchise.

In 2008 and 2009, local television stations were as affected by the economic crisis as other sectors of the economy (Pew, 2009, 2010). We should not underestimate the difficulties that faced the industry. For example, stations in markets 51-100 (Honolulu is number 71) saw average station revenue drop thirteen percent between 2007 and 2008 (Pew, 2010). In contrast, 2010 saw a significant increase in media firms' revenues. For example, out of the $3 billion that was spent on political advertising in that year, $2.4 billion went directly to television stations (tvnewscheck, 2010). Further, television broadcasting revenue increased seventeen percent to $18.5 billion from 2009 to 2010. Of course, the fortunes of the media industry were sufficiently depressed in 2009 that the gains in 2010 could not be considered to be that impressive. However, there are forecasts that the fortunes of local television will realize single digit increases over the 2010 revenues (Malone, 2011).

The movement toward joint/shared/managing service agreements will undoubtedly continue. There are economic incentives for such endeavors. The latest case adds the Atlanta, Georgia DMA to the list of markets. Meredith Local Media, in the glow of a thirty percent increase in revenue, announced that it has entered into a joint service agreement with Turner Broadcasting to manage the operations of that company's Peachtree TV to begin later in 2011 (Malone, M, 2011). The record shows that these arrangements have invariably resulted in a loss of jobs in, at least, one of the stations involved in the agreement. Such is the nature of mergers.

Media firms are trying to create new economic models. E.W. Scripps President/CEO Rich Boehne makes the case forcefully when he states that the model of free content offered by local newscasts and newspapers is unsustainable. Scripps will aggressively experiment with and create models that will take that "high-value premium content and derive much more revenue from it than we do today" (Malone, 2010). He continues that, "we very much believe that local broadcast markets over time will consolidate" (Malone 2010). He is confident enough in that assessment that he makes the offer to media firms to take over their news stations' operations saying that, "It is time to build brands and take market share, mind share, audience share under a local brand when we have the opportunity" (Malone, 2010).

In large measure, the Shared Services Agreement between Raycom and MCG Capital created the very type of local brand that Boehne envisions. *Hawai'i News Now* reflects that reality. The SSA managers have assiduously advanced the *Hawai'i News Now* brand as the news leader in the market and the SSA has changed the face of local newscasts in the Honolulu DMA. That was its stated goal. The most significant change occurred with the introduction of simulcasts. Before the SSA there were no simulcasts of news in the market. Afterwards, news simulcasts were a regular part of the broadcast day. There is the point that any examination of the post-SSA broadcasts would be unduly affected by the simulcasts. But that begs the question. The managers of the SSA stations made the choice to create simulcasts as a direct result of the agreement.

Local television stations are private firms and they have a fiduciary responsibility to provide a return on investment for their owners. However, they conduct their business using a public good---the electromagnetic spectrum. And that imposes public interest responsibilities on the stations as well. Their newscasts are the most profitable portions of their programming. Therefore, there has been the perennial balancing act between what information the stations believe will "sell" and what information the public needs for informed citizenship, although the types of information may not be mutually exclusive. This examination of the Honolulu television market was prompted by an interest in a particular approach to those fiduciary and public interest responsibilities. The SSA stations have maintained that the Shared Services Agreement strikes the proper balance, while critics, such as Media Council Hawai'i, claim that the arrangement misses the mark. Supporters and critics of the shared services phenomenon may see different implications for the findings in this research. That may be unavoidable. However, this research does provide a clear picture of the nature of the newscasts in Honolulu. It is a baseline of information that did not exist previously and, hopefully, it can serve as the reality check against which any claims for or against the role of the Shared Services Agreement can be measured.

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